

TAX PRACTITIONER INSTITUTE

2004

ETHICS **BUSINESS TAXES** **TAX LAW CHANGES**
NEW RULINGS **TAXES FOR INDIVIDUALS** **PINE TREE ZONE**
TAXPAYER ADVOCATE **e-SERVICES** **AMT**

Bangor

Tuesday November 9
JEFF'S CATERING

Augusta

Tuesday November 16
CIVIC CENTER

Portland

Thursday November 18
KEELEY THE KATERER

TAX PRACTITIONER INSTITUTE 2004

The Internal Revenue Service and Maine Revenue Services have prepared an exciting program for you this year. In addition, we offer the following features:

- Printing and mailing costs have been reduced by e-mailing brochures wherever possible and we are able, therefore, to maintain the cost at \$75
- One hour devoted to ethics - a requirement for certification by many professional bodies.
- For those completing the workshop your CEU certificate will reflect the time devoted to ethics.
- Optional notification of any updates to the workbook.
- A new location in Portland: larger and more comfortable facilities at Keeley The Katerer.
- Optional confirmation of registration by e-mail.

These seminars fill up fast so we are continuing our policy of accepting prepaid registrations by mail only and will process in order of receipt at our office until the rooms are filled.

- Presented by specialists from Internal Revenue Service & Maine Revenue Services •
- Workshops designed for those interested in keeping abreast of the constantly changing world of Federal and State tax laws and regulations •
 - Individual and Small Business tax return issues are featured •

PROGRAM 2004

8:00-8:30 am	Registration	
8:30-9:00 am	Welcome and Introduction	Adrian Gonzalez
9:00-10:00 am	Tax Law Updates for Individuals	Tess Armstrong
10:00-10:15 am	----- Break -----	
10:15-11:15 am	Tax Law Updates for Businesses	Shawn Savage
11:15-11:45am	New Cases, Rulings and Developments	Susan Silvestri
11:45-12:30 pm	----- Lunch -----	
12:30-1:30 pm	Ethics Studies	Andrea Tupper
1:30-2:00 pm	e-Services Demonstration	Susan Silvestri
2:00-2:45 pm	Taxpayer Advocate	Don Boucher
2:45-3:00 pm	----- Break -----	
3:00-5:00 pm	State of Maine (Bangor: Dennis Doiron & Christina Ward. Augusta: Dennis Doiron & Richard Truman. Portland: Dennis Doiron & Anthony Gould) - Maine Tax Law and Forms Changes: Pine Tree Zone Tax benefits, alternative minimum tax, bonus depreciation/§ 179 add-back and recovery and more . . . - Developments in tax processing	

INTERNAL REVENUE SERVICE PRESENTERS

ADRIAN F. GONZALEZ - Territory Manager for Taxpayer Education and Communication in the Small Business and Self Employed Division. He is responsible for all aspects of small business education services in Maine, New Hampshire and Vermont and has been with the Internal Revenue Service for 16 years. He was selected for his current position in June of 2001 and has worked to build a strong team dedicated to assisting small businesses and self employed individuals understand and meet their critical tax obligations.

DON BOUCHER- Local Taxpayer Advocate, Taxpayer Advocate Service. Don came to the Taxpayer Advocate Service in the fall of 2001. His almost 30 year career with IRS includes revenue agent and examination group manager. Additionally Don instructs in the Thomas College Masters of Taxation program.

ANDREA R. TUPPER - Senior Tax Specialist for Taxpayer Education and Communication in the Small Business/Self Employed division where she conducts educational workshops and other outreach activities with groups and organizations in Maine. She has been with the Internal Revenue Service for 17 years and has a degree in Business Administration/Accounting.

SUSAN SILVESTRI - Senior Tax Specialist for Taxpayer Education and Communication in the Small Business/Self Employed division. She has been with the Internal Revenue Service for 26 years, has a Liberal Arts degree and a Maine CPA certificate.

SHAWN SAVAGE - Senior Tax Specialist for Taxpayer Education and Communication in the Small Business/Self Employed division. He has been with the Internal Revenue Service for 14 years and has a degree in Business Administration.

TESS ARMSTRONG - Tax Specialist for Taxpayer Education and Communication. She has been with the IRS since 1997 and holds a degree in Humanities and Art from the University of Connecticut.

MAINE REVENUE SERVICES PRESENTERS

DENNIS DOIRON – Dennis has been the Director of the Income/Estate Tax Division since 2000; he formerly was an Assistant Attorney General representing Maine Revenue Services. He is currently responsible for individual and business income taxes (including corporate, franchise and withholding) and tax benefit programs (BETR and Tax & Rent).

CHRISTINA WARD – Christina is a Tax Division Assistant Director with the Income/Estate Tax Division overseeing all levels of taxpayer assistance as well as the review and desk audit of tax returns and benefit program applications. She has been employed by the state for more than 20 years, all but one with Maine Revenue Services.

ANTHONY GOULD – Anthony has been employed by the state for more than 20 years and is currently a Tax Division Assistant Director with Maine Revenue Services. He is responsible for the administration of business taxes (corporate, franchise and withholding) and for the analysis of legislation and forms design for all tax programs administered by the Income/Estate Tax Division.

RICHARD TRUMAN, CPA – Richard has worked for Maine Revenue Services for 14 years in various positions, including appellate officer, auditor and currently as Tax Section Manager for Business Income and Insurance Taxes.

THE TAX PRACTITIONER INSTITUTE

The Tax Practitioner Institute holds workshops at three convenient locations throughout Maine. It is designed for the professional tax practitioner and others who wish to stay current with Federal and State tax regulations. SCORE co-ordinates these workshops with the Internal Revenue Service and Maine Revenue Services. Specialists in the field of taxation will make the presentations and stand ready to answer your questions.

The registration fee includes a copy of The 2004 Federal Tax Book which contains up-to-date information on Federal tax changes, cases and rulings.

A certificate awarding eight Continuing Professional Education Credits (with specific mention of one hour devoted to the subject of ethics) will be presented to attendees completing the workshop.

To ensure adequate catering, registrations must be received no later than one week prior to your scheduled workshop.

Cancellations need to be received at least one week prior to the event.

For further information contact SCORE, Augusta at 622-8509 (telephone); 622-8277 (fax).

SCORE is a not-for-profit organization dedicated to helping the small business community with business counseling (at no charge) and low-cost workshops. SCORE Association members volunteer their time and considerable business expertise to help coach entrepreneurs.



REGISTRATION FORM

The fee for the workshop is \$75 per person which includes lunch, refreshments and a copy of The 2004 Federal Tax Book.

Location you will attend (please circle one):

BANGOR

Tuesday November 9
JEFF'S CATERING

AUGUSTA

Tuesday November 16
CIVIC CENTER



NEW LOCATION



PORTLAND

Thursday November 18
KEELEY THE KATERER

Please indicate your capacity (circle one): CPA Enrolled Agent Attorney Other

Please print name and address below. Please include company name.

Name: _____

Company: _____

Address: _____

City/Town: _____

State: _____ Zip: _____

Telephone No: _____

If you would like us to confirm your registration and notify you of workbook updates then please include your e-mail address below:

(We do not give out your e-mail address to others)

Please mail the registration form together with a check for \$75 made payable to **SCORE** to the following address:

Tax Practitioner Institute,
SCORE,
68 Sewall Street, Room 512,
Augusta, Maine 04330

DIRECTIONS TO YOUR WORKSHOP

BANGOR - Jeff's Catering, Coffin Avenue, Brewer

On I95 North or South take Exit 182A on to I395 East. Travel to Exit 5 and turn left onto Parkway South at the end of the ramp. Travel 0.1 mile over the railroad tracks and take the next right into East/West Industrial Park. Travel about 100 yards and turn left into Coffin Avenue.

From Ellsworth take I395 West. Travel to Exit 5 and turn left onto Parkway South at the end of the ramp. Travel 0.1 mile over the railroad tracks and take the next right into East/West Industrial Park. Travel about 100 yards and turn left into Coffin Avenue.

AUGUSTA - Civic Center, Community Drive, Augusta

On I95 North take Exit 112A and turn right at the end of the ramp. Turn right onto Community Drive at the next set of traffic lights.

On I95 South take Exit 112 and turn left at the end of the ramp. Turn right onto Community Drive at the next set of traffic lights.

Parking and Entry - Travel about 0.2 mile to the end of this road, look for the "North Wing" sign on the building and park in the area to the right. Enter the North Wing door and take the elevator or stairs to the Capitol/Pine Tree rooms.

PORTLAND – Keeley The Katerer, 178 Warren Avenue, Portland

On I95 North or South (Maine Turnpike) take Exit 48 and keep to the right of the toll booth (no toll at this exit).

At the traffic light turn right onto Riverside Street. At the second set of traffic lights turn right onto Warren Avenue and Keeley The Katerer is 1 mile on the right hand side.

From Forest Avenue turn onto Warren Avenue and Keeley The Katerer is ¼ mile on the left hand side.